TO: All Region Operations Managers (Ex. W.E. Surman and D.R. Williams)

FROM: E. A. Toulon, extension #6316

DATE: December 22, 1997

SUBJECT: New Version "Sales Account Management"

Mike

On the afternoon of Friday, January 9, 1998, the new version of "Sales Account Management" will be available for download to **all Managers**. Attached you will find step-by-step instructions (Attachment I) that each Manager must complete to pick up the new application. Please read Attachment I carefully prior to beginning the download process. It will be necessary for each step to be completed to ensure a successful conversion to the new application.

Listed below are the changes to Account Management that will occur once a successful download is achieved. Additionally, you will notice a change in the speed of the new application. You will see a marked time savings in the full download communication process, movement from button to button and folder to folder, as well as creating work requests for large account groups.

What Has Changed

- F12 - Account List
  - Sales Rep and Retail Rep radio buttons are now separated vs. the old toggle button.
  - Due to the conversion, all account clusters previously created will have to be recreated.
  - "View by Smart Route": Allows a routed Retail Rep the ability to view a single day or full week of routed calls in their F12 Account List.
- F3 - Open Call
  - "Generic Work Request Folder" - continuous work request is no longer an option.
  - Price Gap Folder is not operational at this time (this will be a Retail Rep function).
- F4 - Work Request
  - Continuous work request no longer an option.
- F5 - Admin
  - Display Table Folder has a new look.
  - Summaries Folder has a new look.
  - F5 - Wholesalers Folder has a new look.
  - F5 - Activity Planning Folder has been added. This folder is grayed out and only available for Retail Representatives.
- F6 - Account Review
  - Brand Volume has a new look.
  - Share by Brand has a new look.
  - Share by Company has a new look.
- F7 - Schedule
  - Router Folder has been added for Division Managers/Retail Managers. Attachment II contains instructions on the functional changes made to router.

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- F8 - Locator
  - The locator has a new look. Also now includes a list of "The World" which includes all Field Sales as well as Home Office Sales personnel assigned to an area.
- Reports
  - Reports is now a button instead of a menu option in Account Management.

If any problems are encountered with the steps to complete the conversion to the new application, please call the Hotline at (800) 255-7745.

ccd

Attachments

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Attachment I

Conversion to New Account Management Application

1. Perform a communication. This may take a while so do it after work and let it go for the evening.
2. Power off your laptop
3. Power on your laptop
4. Go to File Manager or Explorer
5. Go to the UTIL directory
6. Double click on the program MGRCVRT.EXE in the UTIL directory
7. You should see the "Account Management Conversion Assistant" window
8. If you see a message stating "The required zip files for conversion were not found", then you need to communicate your machine.
9. If you see the message "Click on Run Conversion to run application conversion", then you are ready to start the conversion.
10. Click on the Run Conversion button.
11. You will see a window unzipping new files during this installation.
12. When it is complete you will be returned to the Account Management Conversion Assistant.
13. A message will tell you "The new application installation is complete". "You must now communicate for full download"
14. Click the Exit button
15. Go to the Desktop and perform a Full Download. This is an important step. If you do not do this step, then you will not have any data in Account Management. When you receive the Setuser screen, enter your division number followed by XX (ex. 5831XX) in the Territory field, your User Id (ex. PELLETD - the one you logon the computer with), and your employee number. Social Security# **is not required**, but if you enter it it must be a valid SSN number.
16. After a successful communication, go to the Desktop and click on Account Management.
17. Verify your accounts are showing in Account Management.
18. Exit Account Management
19. Power off your laptop
20. Power on your laptop
21. Go to File Manager or Explorer
22. Double click on the program MGRCVRT.EXE in the UTIL directory

    **** NOTE ****** Once you do the next steps you CANNOT return to the old Account Management Application

23. Click on the Delete Recovery Files button. At the "You really want to delete these files" prompt Click YES. You will see a DOS window appear. It will close when it is complete and return you to the Account Management Conversion Assistant window.
24. The message "You are now doing your work with the new version of ...... Sales Account Management" should be displayed.
25. Click the Exit Button --- You are converted!!!
26. Please perform a complete backup after the conversion. Your old backup WILL NOT work properly with the new Account Management Application.

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